Virginia Association of Counties
ACHIEVEMENT AWARDS

VACo
Virginia Association of Counties

SUBMISSION FORM

All submission forms must include the following information. Separate submission forms must be turned in for each eligible program. **Deadline: July 1, 2022.** Please include this submission form with the electronic entry. If you do not receive an email confirming receipt of your entry within 3 days of submission, please contact Gage Harter.

PROGRAM INFORMATION

County: Prince William

Program Title: On Demand Procurement Training

Program Category: Organizational Development

CONTACT INFORMATION

Name: Michelle Attreed

Title: Chief Financial Officer

Department: Finance

Telephone: 703-792-6752   Website: www.pwcgov.org

Email: mattreed@pwcgov.org

SIGNATURE OF COUNTY ADMINISTRATOR OR DEPUTY/ASSISTANT COUNTY ADMINISTRATOR

Name: Elijah T. Johnson

Title: Acting County Executive

Signature: _[signature]_

On Demand Procurement Training

Prince William County, Virginia

2022 Achievement Award Category: Organizational Development

1. Program Overview

Prince William County Procurement Services staff identified a need for a standardized County-wide Procurement Training Program to meet the objectives of a consistent education regarding the County's procurement guidelines and processes, with the goal of creating internal efficiencies, reducing risk, and enhancing the County's reputation in the supplier community. Procurement Services staff. in partnership with a group of procurement power users from various County departments, defined the objectives as:

- Creating internal efficiencies; by involving in the process internal stakeholders who are responsible in multiple departments for managing the technical procurement process. This collaboration allows all county departments to now use uniform language, format, justification, etc.; approving transactions faster; requiring fewer corrections.
- Reducing risk and enhancing our reputation in the supplier community as a fair and consistent business partner, operating in compliance with procurement laws and regulations.

Prince William County utilizes a "decentralized/centralized" procurement model. Departments are not required to send individual requests for sourcing to Procurement Services. The Prince William County Procurement Regulations grants departments the authority to purchase goods and services directly under a certain dollar threshold, with minimal intervention by Procurement Services.

The success of the program, in a post COVID-19 world, provides online training and guidance to both new and seasoned staff. The training is available on any device and from any location. The direct result is that the number of purchase orders that the procurement office needs to reject, or return,

has declined. This is allowing for faster turnaround time in the creation and issuance of purchase orders and solicitations. Procurement Officers can refer users to the course material instead of repeating live 1:1 training, freeing up the Procurement Officer's time to focus on strategic sourcing. End users are more confident and accepting of the procurement process, improving the quality of collaboration across departments. The County is better protected because users have more clarity about the procurement principles and laws in Virginia, reducing the likelihood that appropriate competition will not be achieved.

2.   Problem/Challenge/Situation faced by Locality:

Prince William County currently has 32 independent departments that all require training and support from Procurement Services and its Procurement Officers. Over the past years, Procurement Services found that the previous training methodology of in-person training was not serving the County. The in-person training method was time consuming, required both instructors and pupils to take time out of their day and did not meet the needs of the influx of new employees since training was held sporadically during the year. This lack of training sessions resulted in increased to procurement officers even for the most basic of questions.

The onset of COVID-19 and the move to a remote workforce coupled with fact that the County has grown, and new agencies have been brought on board, demonstrated a need for a new and innovative method to deliver procurement training to county employees.

Procurement Services staff felt it was imperative to create value for the organization and the supplier community by empowering departments to conduct high-quality, low-risk procurement transactions.

3. **How Program Fulfilled Award Criteria:**

Develop and deliver procurement training specific to Prince William County (PWC), focused on the risks and responsibilities of purchasing within each department's delegated authority. Training to be delivered through an online self-paced program.

Leverage existing resources and develop new materials for use in the Training Program. Use a variety of delivery methods to facilitate an engaging and useful experience. This was accomplished by creating a team of department ends users, who had a technical knowledge of procurement. This team of inhouse procurement technical creators, those who have the responsibilities of starting a Purchase Order or Requestion to explain to prioritize the needed trainings for the organization.

Incorporate existing Procurement Card training as appropriate.

To create **value** for the PWC organization by **empowering** departments to conduct **high-quality**, **low-risk** procurement transactions within their delegated authority.

Definitions: In collaboration with Procurement Officers the committee worked to draft clear concise definitions that all parties could understand and use as a basis of creating the training program.

a. Value: Efficiencies resulting from transactions executed and approved faster with fewer re-work items and rejections.

b. Empower: Providing the necessary training and resources for departments to understand the risks and responsibilities within their delegated authority, so they can proceed with confidence when interacting with Suppliers without involvement from Procurement Services.

c. High-Quality Transactions: Documents competition to the maximum extent practicable in accordance with the Virginia Public Procurement Act (VPPA) and the thresholds outlined in the Prince William County Procurement Regulations.

d. Low-Risk Transactions: Documents the responsibilities of both the Contractor (goods or services requested; pricing; performance schedule; adherence to terms and conditions) and the County (how performance will be evaluated and accepted; payment terms; funds encumbered; protection outlined in terms and conditions).

e. Delegated Authority: In accordance with Procurement Regulations §300.04 Procurements of $5,000 or more and Less Than $30,000 (Informal Procurement) and §300.05 Procurements of Less Than $5,000 which give Using Departments the authority to make purchases directly in the open market with an appropriate level of competition, based on the dollar amount spent per fiscal year on similar commodities.

How will we know we are successful?

a. Value: Purchase Orders approved with fewer withdrawals and rejections; Purchase Order approval cycle time decreased.

b. Empower: Purchase Orders approved with fewer withdrawals and rejections; Purchase Order approval cycle time decreased. Survey results before and after training demonstrate a higher level of user confidence.

c. High-Quality Transactions: Spot audit conducted; baseline must be established prior to training rollout.

d. Low-Risk Transactions: Spot audit conducted; baseline must be established prior to training rollout (including identified thresholds/commodities).

How Program Was Carried Out:

The creation of this new training started with how the different departments and individuals would be organized.

The first step in the organization process was to convene a power users' group. This groups mission and charter had several mandates.

The first action procurement took was to develop competencies for identifying a Procurement Power User. Once the competencies where determined it became imperative to engage Procurement Services and Finance staff to identify Procurement Power Users in a variety of departments, including Finance. Once identified these power users were invited to participate in the process. Procurement staff then facilitate high-level discussion to capture objectives and goals for the program. What does success look like? How do we make a value case to the organization that staff should invest their time in partaking of the training program when completed?

After the group was identified and accepted to be part of the project, the power user group drafted Project Charter to identify scope, objectives, goals, schedule, risks, resources, outcomes, impacts, evaluation criteria. These criteria where then used to determine what data was needed to measure success and impact; how it would be collected and reported. Much of this was done through in-person and digital meetings to solicit feedback from Power User Group and Procurement Services Staff to create and finalize a Project Charter.

As the group developed and agreed to the project charter it was determined the most efficient way to move forward was to develop an of Outline Topics and Milestones.

The process of developing the outline and milestones included reviewing past training material for subjects Facilitating discussion among Procurement Services Staff to capture potential topics, using Project Charter, and facilitating discussion among Power Users to capture potential topics, using Project Charter. Developing a draft subject outline, and then soliciting feedback on the outline from all users to create the finalized outline.

The Development of the first raining module followed the processes as identified by the user group. The first task was to identify existing resources. These resources consisted of Review past training material for exercises, case studies, etc. The group also engaged external resources such as National Association of State Procurement Officers, the Prince William County Learning & Development Division. They then worked to identify gaps in the current trainings.

As gaps were discovered it became transparent that the group would need to Engage New Resources to help Identify resources to mitigate gaps, create new resources as needed and identify and contract with Instructional Designer. The group concluded that to create a training program that would meet the needs of all employees that an expert in adult learning would need to be contracted for. The instructional designer would be tasked with breaking all the content down into various modules and then subdivision within the modules to best allow for adult learners.

The power users' group as it moved forward Assigned Content Development Tasks to its members. These tasks included reviewing and editing content to ensure that included content was consistent and of high quality and on brand for the County. A second task was to evaluate delivery methods. Determining the most suitable delivery method for each topic by soliciting feedback from both the Power Users Group and the Procurement Staff.

Additional tasks included Determining the time requirement for each section or module. Ensuring that the section was of the appropriate length as not to discourage the users or cause them to lose interest in the training was of importance. Developing evaluation metrics of the program was determined to be a task. The group created detailed feedback instruments for pilot participants with input from Power User Group. As part of this task was to develop a system to track feedback trends for data reporting. Other tasks included delivering a pilot training program, collecting feedback on the pilot program and the reviewing, and summarizing the feedback given and then develop

recommendations on changes needed and presenting these changes to the full power users group.

If recommended changes accepted by the power group, it was then necessary to implement the

changes in the module according to the feedback and then repeated the process to ensure that the

changes accomplished the intention.

As tasks for module content were completed and the initial pilot program delivered and tested the

power user group worked on creating a new set of deliverables to keep the project moving forward.

These new deliverables included marketing of the training program. The need to identify the target

audience, engage the Prince William County University as the register of the program and to provide

SCORM files to the PWC University so that they could upload the files into the central training

database. Lastly was to send communication out to the general county population that the training

was available and could be accessed by any employee no matter what their job function and

responsibilities were.

As the program began its rollout to the general population the project team collected feedback,

reviewed the feedback, and adjusted the program in real time if needed.

4. **Financing and Staffing:**

The primary goal was to produce a high-quality immersive training program by leveraging existing

resources and developing new materials for use in the training program.

All curriculum for the program was developed by an internal group of agency super users and

procurement staff. After multiple discussions it was determined that six (6) core modules would be

needed for the program. The final modules are:

1. Procurement principles

    i. Principles of Public Procurement (Values, Objectivity and Virginia

    Public Procurement Act)

    b. Risks and Responsibilities

    i. Roles (Financial Responsibilities)

    ii. Regulations (Authority and Why/Interpretation)

    iii. Objectives/ Function of Procurement Services

    iv. Encumbering Funds

2. Where to Begin- Examples, checklists, job aids

    a. Purchase Factors (Speed, Cost, Quality)

    b. Exempt items (How to purchase exempt items)

    c. How to estimate annual spend

    d. High-volume/Low- Dollar Purchase Exemptions

    e. Using Contracts (County Contracts: Required Sources, Confirming Contract

    Pricing, Cooperative Contracts- Required forms, How to procure from a

    contract which include Terms, conditions, lengths, expiration dates and

    Requesting Changes to a County contract)

    f. Competition (Sole Source, Single Quote, Three Quote, Formal Solicitation and

    Emergency Procurements)

3. Developing Specification and Communicating Requirements

4. Supplier Relations

5. Contract Administration

6.   Resources

Future modules to be developed include Request for Proposal Evaluation (Selection Committees), Complex Purchase Orders, Task Orders, Construction, and Insurance Requirements.

To deliver a top tier training program, an Instructional Designer was brought in to expertly take the developed curriculum and reformat the ideas and knowledge into the best methods for an adult online learner to access and grasp the presented information.

The cost for the Instructional Designers for two modules was $15,235.00. The County has licensed the software product Articulate 360 at a licensing fee of $1,299 per year.

Cost per year of the program breakdown as follows:

Module 1: Articulate 360- $1,299

Instructional Designer- $8,235

Total -$9534

163 users accessed the course for a per pupil cost of $58.50

Module 2: Articulate 360- $1,299

Instructional Designer- $7,000

Total- $8,299

122 users accessed the course for a per pupil cost of $68.02

The total hard cost to the County for the first two modules has been $17,833.00; this translates to a per pupil cost of $62.57. There are significant soft cost savings as staff does not need to schedule and present these trainings in a live session. This results in less questions to staff regarding

procurement processes and when can trainings be set up. As more and more staff enroll and take

these costs the per pupil price will drop. The total cost has been absorbed by the Procurement

Services division using funds allocated in its budget. No additional funds outside of current budget

have been requested.

5. Program Results

As of February 2022, more than 285 users have accessed the trainings. Each training course

is approximately one hour in length. 285 individuals working at their own pace were able to gain

access to this information, saving staff time and costs, since live in-person trainings were not now

necessary. Multiple departments in Prince William County are requiring their internal users to take

the courses so they have a broader understanding of procurement.

6. **Executive Summary**

Prince William County's vision states that "We are a learning organization, and we rely on leadership at all levels to achieve our Vision." These training modules are an operational priority for Procurement Services to reduce risk, increase efficiencies in the procurement process, and reduce both hard and soft costs in the process.

The worthiness of the award is a testament that staff took the initiative to identify a need and a solution, living up to the county's vision and values, that leadership supported. The work carried out by staff required no additional funding and the results of the program speak to is success.

The impacted employees and departments agree that this program has provided numerous benefits for the County and freed up key staff to participate in the program.

There were risks involved that need to be considered and overcome to make this a successful program. A major risk is that training would not be accessible on a frequent basis so that new Buyers could be trained expediently so they can fulfill their duties as soon as possible. A major overhaul of training delivery methods due to technology changes and the pandemic required the group to reevaluate delivery methods and create a program that was accessible by all in the county regardless of location and technology used to participate.

This training program is the first of its kind in Prince William County. The training programs were entirely created in house using available resources with no requests made for funding. All funding for the licensing software and instructional designer were found by reprioritizing the Procurement Office's existing budget.

Links to Modules are below and can be accessed by the committee for review:

Procurement Principles (Module 1)   Where to Begin (Module 2)